

Send an Email Plus

By



Marzapps



Send an Email Plus

TABLE OF CONTENTS

ADMIN INSTALLATION GUIDE.....	3
ADMIN SETUP GUIDE	3
ADMIN CUSTOMIZATION GUIDE	4
USER GUIDE & INSTRUCTIONS.....	6
CONTACTING SUPPORT	6
FUTURE ENHANCEMENTS.....	7

Admin Installation Guide

Please install our app from the AppExchange and make it available to all users. After installation please follow the Admin Setup Guide below. To install Send an Email Plus you must meet these Requirements:

1. Content Enabled
2. Allow users to relate multiple contacts to Tasks and Events (Activity Setting)

Activity Settings

Modify your activity settings here.

[Help for this Page](#)

Activity Settings

- ☒ Enable Group Tasks
- ☐ Enable Sidebar Calendar Shortcut
- ☒ Enable Creation of Recurring Events
- ☒ Enable Creation of Recurring Tasks
- ☒ Enable Activity Reminders
- ☒ Enable Email Tracking
- ☐ Show Event Details on Multi-User Calendar View
- ☒ Enable Multiday Events
- ☐ Show Requested Meetings in the Calendar Section on the Home Tab
- ☐ Show Custom Logo in Meeting Requests
- ☒ Allow Users to Relate Multiple Contacts to Tasks and Events

Important: Saving this setting may take several minutes after you click Submit, and the entire process to enable this feature can take up to 48 hours to complete, especially if your organization has a high volume of activities. This process may automatically clean up data integrity issues. You cannot reverse or interrupt this process after it starts, but you can check its status here until the feature is fully enabled. [Learn more...](#)

Admin Setup Guide

After installing Send an Email Plus from the App Exchange you will need to add email buttons to the “Activity History” related lists for any Contact, Account, Case and Opportunity Page Layouts where you want users to access the enhanced email functionality.

1. Edit a Contact, Account, Case or Opportunity Page Layout
2. In the “Activity History” Related List click the wrench



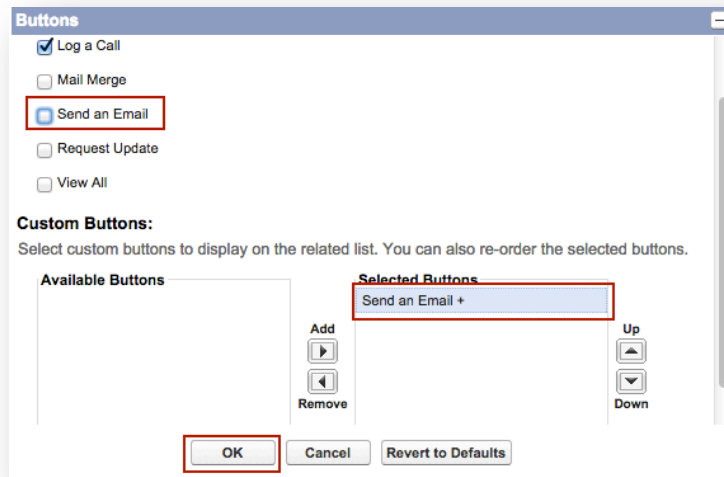
Activity History

[Log a Call](#)

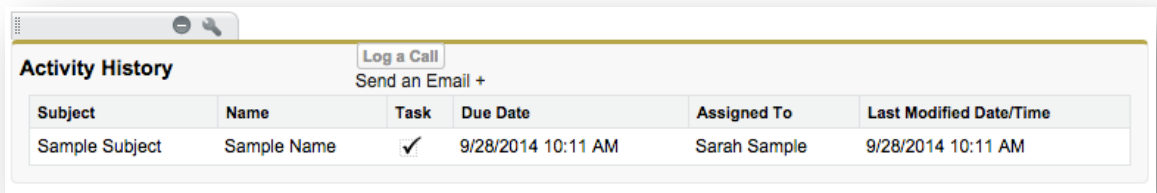
Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Sample Subject	Sample Name	✓	9/28/2014 10:11 AM	Sarah Sample	9/28/2014 10:11 AM

Send an Email Plus

3. Expand the “Buttons” section
4. Uncheck the “Send an Email” button
5. In the “Custom Buttons” section add the “Send an Email +” button



6. Click Ok, you will see the “Send an Email +” button on the related list



7. Save the Page Layout
8. Repeat for each Account, Contact, Case and Opportunity Page Layout

You can also add the “Draft Email” Related list to Account, Contact, Case and Opportunity Page Layouts as well as add the “Draft Emails” tab to of your apps to allow users to access their Draft Emails.

Admin Customization Guide

As an administrator you have several options to customize your end users’ experience. Using the custom settings found in:

Setup > Develop > Custom Settings > SendEmailPlus> Manage



Send an Email Plus

Click “Edit” to edit the Default Organization Level or “New” to create a new setting Level. For more information on managing Hierarchy Customer Settings see:
http://help.salesforce.com/HTViewHelpDoc?id=cs_about.htm

The options available to customize are:

- **Default From Address Id**- The Id of the org wide email address that should default as the from address when a user sends an email
- **Default Template Id**- The Id email template that will automatically load when a user sends an email.
- **Record Additional Tasks**- Check this off to include Additional To, CC and BCC Contacts on the resulting task. Requires Shared Activities.

Additional customizations are available by contacting support@marzapps.com



Send an Email Plus

User Guide & Instructions

Once “Send an Email +” buttons have been added to your page layouts you can start using the enhanced email functionality. From any Account, Contact, Case or Opportunity in the “Activity History” related list click the “Send an Email +” button.

From this page you can do everything you could from the standard “Send an Email Page” **PLUS**:

1. Save email drafts using the “Quick Save” and “Save” buttons.
2. Search for email templates using the “Select Template” button.
3. Select an existing files from Content, Chatter, the Case or the Contact to include on the email using the “Attach File” button.
4. Upload a file from you computer to include on the email AND attach it to the Case or Contact using the “Attach File” button.
5. Add additional emails (To, CC, or BCC) to the email by searching for contacts by clicking the “Add Emails” link and then using the lookup (eyeglass) button.

Administrators can also setup default templates and from address that will load automatically. Please contact your administrator for setup.

Contacting Support

If you need help, have questions or comments Support can be reached by emailing us at: support@marzapps.com We will respond to your email within two business days.



Send an Email Plus

Future Enhancements

- Support for additional standard and custom objects, specifically Leads.
- Integration of 3rd Party email senders like SendGrid